



HEWLETT-PACKARD COMPANY  
Intellectual Property Administration  
P.O. Box 272400  
Fort Collins, Colorado 80527-2400

PATENT APPLICATION

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IN THE  
UNITED STATES PATENT AND TRADEMARK OFFICE

Inventor(s): Christopher Dean FARNES et al.

Confirmation No.: 8629

Application No.: 10/085,652

Examiner: Boyce, A. D.

Filing Date: 02/27/02

Group Art Unit: 3623

Title: TOTAL CUSTOMER EXPERIENCE SOLUTION SET

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Commissioner For Patents  
PO Box 1450  
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TRANSMITTAL OF APPEAL BRIEF

Transmitted herewith is the Appeal Brief in this application with respect to the Notice of Appeal filed on 04/02/07.

The fee for filing this Appeal Brief is (37 CFR 1.17(c)) \$500.00.

(complete (a) or (b) as applicable)

The proceedings herein are for a patent application and the provisions of 37 CFR 1.136(a) apply.

☐ (a) Applicant petitions for an extension of time under 37 CFR 1.136 (fees: 37 CFR 1.17(a)-(d)) for the total number of months checked below:

☐ 1st Month  
\$120

☐ 2nd Month  
\$450

☐ 3rd Month  
\$1020

☐ 4th Month  
\$1590

☐ The extension fee has already been filed in this application.

☒ (b) Applicant believes that no extension of time is required. However, this conditional petition is being made to provide for the possibility that applicant has inadvertently overlooked the need for a petition and fee for extension of time.

Please charge to Deposit Account 08-2025 the sum of \$ 500. At any time during the pendency of this application, please charge any fees required or credit any over payment to Deposit Account 08-2025 pursuant to 37 CFR 1.25. Additionally please charge any fees to Deposit Account 08-2025 under 37 CFR 1.16 through 1.21 inclusive, and any other sections in Title 37 of the Code of Federal Regulations that may regulate fees. A duplicate copy of this sheet is enclosed.

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Signature: Desiree Reardon

Respectfully submitted,

Christopher Dean FARNES et al.

By John P. Wagner, Jr.

John P. Wagner, Jr.

Attorney/Agent for Applicant(s)

Reg No. : 35,398

Date : 06/04/07

Telephone : (408) 938-9060

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IN THE UNITED STATES PATENT AND TRADEMARK OFFICE  
BEFORE THE BOARD OF PATENT APPEALS AND INTERFERENCES

Appellant: Farnes et al.

Patent Application

Serial No.: 10/085,652

Group Art Unit: 3623

Filed: February 27, 2002

Examiner: Boyce, Andre D.

For: TOTAL CUSTOMER EXPERIENCE SOLUTION TOOLSET

Appeal Brief

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Real Party in Interest

The assignee of the present invention is Hewlett-Packard Company.

### Related Appeals and Interferences

There are no related appeals or interferences known to the Appellants.

Status of Claims

Claims 1-33 have been rejected. This appeal involves Claims 1-33.

### Status of Amendments

All proposed amendments have been entered. An amendment subsequent to the Final Action has not been filed.

### Summary of Claimed Subject Matter

Independent Claims 1, 20 and 27 of the present application pertain to various embodiments a total customer experience solution toolset. The present application states on page 5 lines 16-19, "Embodiments of the present invention pertain to a set of prescribed set of actions and tools to help a person (or team of people) to identify customer needs and to define a solution path and architecture that meet customer requirements that are aligned with business objectives."

Independent Claim 1 recites,

"A method for developing a solution to a customer experience issue, said method comprising:

- a) identifying a target customer including customer requirements and a customer profile;
- b) defining a current customer experience and comparing it with a customer experience provided by a competitor;
- c) summarizing values and benefits that should be provided to said target customer;
- d) identifying metrics for measuring success of a solution;
- e) identifying gaps between current solutions and said benefits; and
- f) generating solutions for delivering said benefits and selecting a solution path which delivers the greatest number of benefits"

A description of "a) identifying a target customer including customer requirements and a customer profile" can be found on page 10 line 16 to page 12 line 17 (refer to A.1 and A.2 in Figure 2A). A description of "b) defining a current customer experience and comparing it with a customer experience provided by a competitor" can be found on page 12 line 19 to page 14 line 20 (refer to A.3 and A.4 in Figure 2A). A description of "c) summarizing values and benefits that should be provided to said target customer" can be found on page 14 line 21 to page 16 line 19 (refer to A.5 and A.6 in Figure 2A). A description of "d) identifying metrics for measuring success of a solution" can be found on page 16 line 21 to page 18 line 6 (Refer to A.7 in Figure 2A). A description of "e) identifying gaps between current solutions and said benefits" can be found on

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page 19 lines 15-23 (refer to B.1.2 in Figure 2B). A description of “f) generating solutions for delivering said benefits and selecting a solution path which delivers the greatest number of benefits” can be found on page 19 line 24 to page 21 line 3 (refer to B.2 in Figure 2B).

Independent Claim 27 recites,

“A method for developing a solution to a customer experience issue, said method comprising:

- a) identifying gaps between current solutions and benefits that should be provided to a target customer;
  - b) generating solutions for delivering said benefits and selecting a solution path which delivers the greatest number of benefits;
  - c) defining a future customer experience for a selected solution;
  - d) developing an architecture for implementing said solution path;
- and
- e) defining use-cases describing task interactions between participants in said solution path and said solution path.”

A description of “a) identifying gaps between current solutions and benefits that should be provided to a target customer” can be found on page 18 line 36 to page 19 line 23 (refer to B1 in Figure 2B). A description of “b) generating solutions for delivering said benefits and selecting a solution path which delivers the greatest number of benefits” can be found on page 19 line 24 to page 21 line 3 (refer to B2 in Figure 2B). A description of “c) defining a future customer experience for a selected solution” can be found on page 21 line 5 to page 22 line 4 (refer to B3 in Figure 2B). A description of “d) developing an architecture for implementing said solution path” can be found on page 22 line 26 to page 25 line 31 (refer to B5 and B6 in Figure 2B). A description of “e) defining use-cases describing task interactions between participants in said solution path and said solution path” can be found on page 25 lines 1-31 (refer to B.6.2 in Figure 2B).

Independent Claim 20 recites,

"A method for developing a solution to a customer experience issue, said method comprising:

- a) collecting data about customers affected by said customer experience issue;
- b) segmenting customers and identifying a customer segment most affected by said customer experience issue, said customer segment representing a target customer;
- c) identifying attributes of said target customer associated with said customer experience issue to generate a customer profile;
- d) generating a customer experience flow by organizing components of a current customer experience according to their order of occurrence, wherein said customer experience flow identifies instances in which customer requirements are unmet;
- e) identifying gaps between attributes of said current customer experience and attributes of a customer experience provided by a competitor;
- f) summarizing values and benefits that should be provided to said target customer; and
- g) identifying metrics for measuring success of a solution."

A description of "a) collecting data about customers affected by said customer experience issue" can be found at page 10 line 31 to page 11 line 2 (refer to A.1.1 in Figure 2A). A description of "b) segmenting customers and identifying a customer segment most affected by said customer experience issue, said customer segment representing a target customer" can be found on page 10 lines 15-22 (refer to A.1.3 in Figure 2A). A description of "c) identifying attributes of said target customer associated with said customer experience issue to generate a customer profile" can be found on page 11 lines 30-37 (refer to A.2.1 in Figure 2A). A description of "d) generating a customer experience flow by organizing components of a current customer experience according to their order of occurrence, wherein said customer experience flow identifies instances in which customer requirements are unmet" page 12 line 34 to page 13 line 15 (refer to A.3.2 and A.3.4 in Figure 2A). A description of "e) identifying gaps between attributes of said current customer experience and attributes of a customer experience provided by a competitor" can be found on page 14 line 9-

12 (refer to A.4.4 in Figure 2A). A description of “f) summarizing values and benefits that should be provided to said target customer” can be found on page 14 line 21 to page 16 line 19 (refer to A.5 and A.6 in Figure 2A). A description of “g) identifying metrics for measuring success of a solution” can be found on page 16 line 21 to page 18 line 6 (refer to A.7 in Figure 2A).

Grounds of Rejection to be Reviewed on Appeal

1. In paragraph 4 of the Office Action, Claims 1, 2, 4, 13, 14, 18, 19, 27-30 and 33 are rejected under 35 U.S.C. §102(b) as being anticipated by U.S. Patent No. 6,115,691 by Ulwick et al. (referred to hereinafter as "Ulwick").

2. In paragraph 6 of the Office Action, Claims 3, 5-12, 15-17, 20-26, 31 and 32 are rejected under 35 U.S.C. §103(a) as being unpatentable over Ulwick in view of U.S. Patent Publication No. 2002/0049621 by Bruce (referred to hereinafter as "Bruce").

## Arguments

1. Whether Claims 1, 2, 4, 13, 18, 19, 27-30 and 33 are anticipated by Ulwick (6,115,691) under 35 U.S.C. 102(b).

### A. Scope and Content of the Cited Prior Art Reference (Ulwick)

Ulwick teaches a computer based process for strategy evaluation and optimization based on customer desired outcomes and predictive metrics. Referring to the abstract, Ulwick teaches “evaluating a plurality of strategic options thus yielding a strategic option which best satisfies the customer desired outcomes.”

### B. Differences Between the Cited Prior Art References and the Claimed Invention.

Claim 1 recites,

“A method for developing a solution to a customer experience issue, said method comprising:

- a) identifying a target customer including customer requirements and a customer profile;
- b) defining a current customer experience and comparing it with a customer experience provided by a competitor;
- c) summarizing values and benefits that should be provided to said target customer;
- d) identifying metrics for measuring success of a solution;
- e) identifying gaps between current solutions and said benefits; and
- f) generating solutions for delivering said benefits and selecting a solution path which delivers the greatest number of benefits” (emphasis added).

Appellants respectfully submit that Ulwick does not teach or suggest, among other things “a customer profile...a customer experience provided by a competitor ...identifying gaps between current solutions and said benefits ...” (emphasis added) as recited by Claim 1.

The Office Action asserts that Ulwick teaches "a) identifying a target customer including customer requirements and a customer profile," as Col. 6 lines 7-10. However, Col. 6 lines 7-10 state, "For each mission that a user may select, all the individuals, groups of individuals or customers that must be considered in order to achieve that mission are identified in advance, and presented to the user." Therefore Ulwick teaches identifying and presenting a list of customers to a user but does not teach "a) identifying a target customer including customer requirements and a customer profile," (emphasis added) as recited by Claim 1.

The Office Action asserts that Ulwick teaches a customer experience provided by a competitor," at the portion of Figure 19a that states "can organization compete effectively against other organizations." Col. 6 lines 18-20 indicate that "Desired outcomes for each of those individuals or groups are captured in advance..." However, there is nothing in Ulwick to indicate that a customer experience is provided by a competitor.

The Office Action asserts that Ulwick teaches "e) identifying gaps between current solutions and said benefits," (emphasis added) at Col. 7 lines 63-67. However, Col. 7 lines 63-67 state, "The user is presented with a means by which to quantify the potential value of each alternative solution..." (emphasis added). However, Ulwick says nothing about "current solutions" and therefore cannot teach or suggest "e) identifying gaps between current solutions and said benefits."

The Response to Arguments Section lines 8-15 of paragraph 6 cited Col. 14 lines 50-54, Col. 15 lines 16-22, Figures 19a and 20a against "b) defining a current customer experience and comparing it with a customer experience provided by a competitor," as recited by Claim 1. Ulwick states at Col. 14 lines 50-54,

The quantitative market research is conducted through interviews with a representative sample of the target market. The external customers are often "end users" and individuals responsible for making the decisions to purchase the organization's products or services.

Note that Col. 14 lines 50-54 make no mention of “a competitor” let alone “a customer experience provided by a competitor.”

Ulwick states at Col. 15 lines 16-22,

For each market segment for which research data is obtained, that data is quantified and prioritized. For example, the desired outcomes identified for a particular market segment are ranked in terms of those desired outcomes that are important yet unsatisfied being assigned a high rank, while those desired outcomes that are non-important and/or satisfied being assigned a low rank.

Note that Col. 15 lines 16-22 make no mention of “a competitor” let alone “a customer experience provided by a competitor.”

With respect to Figure 19a, Ulwick states at Col. 16 lines 35-39, “FIG. 19 illustrates actual data wherein desired outcomes are listed down the left hand column (nos. 1-26) and corresponding predictive metrics are listed from left to right across the top (nos. 1-26).” Therefore Figure 19a does not teach anything about “a competitor” let alone “a customer experience provided by a competitor.”

With respect to Figure 20a, Ulwick states at Col. 16 lines 58-64,  
...predictive metrics are realigned such that those metrics which strongly predict the delivery of one or more highly ranked desired outcomes are found to the left hand side of FIG. 20 (high normalized importance), while those predictive metrics which predict delivery of relatively low ranked desired outcomes are found to the right hand side of FIG. 20 (low normalized importance).

Therefore Figure 20a does not teach anything about “a competitor” let alone “a customer experience provided by a competitor.”

For at least the foregoing reasons, Claim 1 should be patentable over Ulwick for at least the reason that Ulwick does not teach or suggest “a customer profile...a customer experience provided by a competitor ...identifying gaps between current solutions and said benefits ...” (emphasis added) as recited by Claim 1.

Claim 27 recites,

"A method for developing a solution to a customer experience issue, said method comprising:

- a) identifying gaps between current solutions and benefits that should be provided to a target customer;
  - b) generating solutions for delivering said benefits and selecting a solution path which delivers the greatest number of benefits;
  - c) defining a future customer experience for a selected solution;
  - d) developing an architecture for implementing said solution path;
- and
- e) defining use-cases describing task interactions between participants in said solution path and said solution path."

Appellants respectfully submit that Ulwick does not teach or suggest "a) identifying gaps between current solutions and benefits that should be provided to a target customer... c) defining a future customer experience for a selected solution; d) developing an architecture for implementing said solution path ... e) defining use-cases describing task interactions between participants in said solution path and said solution path," as recited by Claim 27.

The Office Action asserts that Ulwick teaches "a) identifying gaps between current solutions and benefits that should be provided to a target customer" at Col. 7 lines 63-67 and Col. 8 lines 10-12. However, Col. 7 lines 63-67 state, "The user is presented with a means by which to quantify the potential value of each alternative solution..." (emphasis added) and Col. 8 lines 10-12 state, "The invention as described herein provides an interactive approach that presents the user with weaknesses and strengths that exist in any solution." However, nowhere does Ulwick say anything about "e) identifying gaps between current solutions and said benefits," (emphasis added).

The Office Action asserts that Ulwick teaches "c) defining a future customer experience for a selected solution," at Col. 8 lines 27-30. However, Col. 8 lines 27-30 state, "Since the value of a potential solution can be determined in advance of its actual development or implementation, the user saves much time, effort and money." (emphasis added) Col. 8 lines 27-30 say nothing about "a future customer experience," let alone teach "defining a future customer experience for a selected solution" (emphasis added).



The Office Action asserts that Ulwick teaches “d) developing an architecture for implementing said solution path” at Col. 13 lines 13-16. Ulwick states at Col. 13 lines 13-16,

With reference to the drawings, FIGS. 1-18a-c depict the preferred embodiment of the instant invention, which is generally referred by numeral 100. The software of the present invention for implementing the process for strategy evaluation and optimization has been designed and implemented on a personal computer system...

Although Ulwick provides software that implements a process for evaluating and optimizing strategies Ulwick does not teach “d) developing an architecture for implementing said solution path” where said solution path “delivers the greatest number of benefits” as recited by Claim 27.

The Office Action asserts that Ulwick teaches “e) defining use-cases describing task interactions between participants in said solution path and said solution path,” at Col. 15 lines 56-59. However, Col. 15 lines 56-59 state, “The objective of this analysis is to ensure that production and delivery is considered in the planning phase of the project, and that the solution will be free from production or delivery issues.” Note that Col. 15 lines 56-59 say nothing about “use-cases” or “task interactions,” let alone say anything about “defining use-cases describing task interactions between participants in said solution path and said solution path.”

The response to arguments section starting on the third from last line of page 15 to line 4 of page 16 cited Col. 15 lines 56-59 and figure 19a against “e) defining use-cases describing task interactions between participants in said solution path and said solution path.” The reasons that Col. 15 lines 56-59 does not teach or suggest “e) defining use-cases describing task interactions between participants in said solution path and said solution path” have already been discussed herein. Concerning Figure 19a, the Office Action states, “Ulwick discloses coordinating actions across all functions, possessing the skill set to achieve a goal, and cooperation across organization functions... As a result, Ulwick indeed discloses defining use-cases describing task interactions between participants in said solution path and said solution path.” Appellants respectfully point to Col. 16 lines 35-39 of Ulwick which state, “FIG. 19 illustrates actual data wherein desired outcomes are listed down the left hand column ... and

corresponding predictive metrics are listed from left to right across the top...” Therefore, Figure 19A does not teach anything about, among other things, “use-cases,” “solution path,” “task interactions between participants in said solution path,” as recited by Claim 27.

Therefore, Claim 27 should be patentable over Ulwick for at least the reason that Ulwick does not teach or suggest “a) identifying gaps between current solutions and benefits that should be provided to a target customer... c) defining a future customer experience for a selected solution; d) developing an architecture for implementing said solution path ... e) defining use-cases describing task interactions between participants in said solution path and said solution path,” as recited by Claim 27.

Claims 2, 4, 13, 14, 18, and 19 depend on Claim 1. Claims 28-30 and 33 depend on Claim 27. These dependent claims include all of the limitations of their respective independent claims. Further, these dependent claims include additional limitations which further make them patentable. Therefore, these dependent claims should be patentable for at least the reasons that their respective independent claims should be patentable.

2. Whether Claims 3, 5-12, 15-17, 20-26 and 32 are unpatentable under 35 U.S.C. 103(a) over Ulwick (6,115,691) in view of Bruce (2002/0049621).

A. Scope and Content of the Cited Prior Art References (Ulwick and Bruce)

The scope of Ulwick has already been discussed in section 1.A of this Appeal Brief.

Bruce teaches decision dynamics. For example, Bruce states in the abstract,

The invention is a method and a means for analyzing a process in terms of the elements that are the drivers of the process. The invention evaluates a process in terms of one or more scheduling drivers and process drivers, measures the metrics around the drivers and relates the measured values to key performance indicators of the drivers and the overall process. The metrics of the drivers can be correlated to past performance to determine if the attributes of the drivers being measured should be changed. The invention is appropriate for evaluating the processes of a business organization where the processes can be defined by one of the five process flows of the invention.

B. Differences Between the Cited Prior Art References and the Claimed Invention.

As already stated, Claims 1 and 27 are patentable over Ulwick because Ulwick fails to teach or suggest "a customer profile...a customer experience provided by a competitor ...identifying gaps between current solutions and said benefits ..." (emphasis added) as recited by Claim 1 and fails to teach or suggest "a) identifying gaps between current solutions and benefits that should be provided to a target customer... c) defining a future customer experience for a selected solution; d) developing an architecture for implementing said solution path ... e) defining use-cases describing task interactions between participants in said solution path and said solution path," as recited by Claim 27. Further, the Office Action does not assert that Bruce teaches or suggests independent

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Claims 1 and 27. Therefore, independent Claims 1 and 27 should be patentable over Ulwick and Bruce, alone or in combination.

Claim 20 recites,

"A method for developing a solution to a customer experience issue, said method comprising:

a) collecting data about customers affected by said customer experience issue;

b) segmenting customers and identifying a customer segment most affected by said customer experience issue, said customer segment representing a target customer;

c) identifying attributes of said target customer associated with said customer experience issue to generate a customer profile;

d) generating a customer experience flow by organizing components of a current customer experience according to their order of occurrence, wherein said customer experience flow identifies instances in which customer requirements are unmet;

e) identifying gaps between attributes of said current customer experience and attributes of a customer experience provided by a competitor;

f) summarizing values and benefits that should be provided to said target customer; and

g) identifying metrics for measuring success of a solution."

Appellants respectfully submit that neither Ulwick nor Bruce, alone or in combination, teach or suggest, "c) identifying attributes of said target customer associated with said customer experience issue to generate a customer profile; d) generating a customer experience flow by organizing components of a current customer experience according to their order of occurrence, wherein said customer experience flow identifies instances in which customer requirements are unmet," as recited by Claim 20.

The Office Action asserts that Ulwick teaches "c) identifying attributes of said target customer associated with said customer experience issue to generate a customer profile," at Col. 15 lines 5-8. However, Col. 15 lines 5-8 state "The results of the segmentation analysis often reveal the existence of segments that cut across traditional classification schemes. Each of these segments represents a new market opportunity" (emphasis added). Col. 15 lines 5-8 say nothing about generating a customer profile let alone teach or suggest "c) identifying attributes of said target customer associated with said customer experience issue to generate a customer profile."

The Office Action asserts that Ulwick teaches “d) generating a customer experience flow by organizing components of a current customer experience according to their order of occurrence, wherein said customer experience flow identifies instances in which customer requirements are unmet,” (emphasis added) at Col. 16 lines 18-21, Col. 7 lines 63-67, and Col. 8 lines 10-12. Col. 16 lines 18-21 state, “The present invention further contemplates the establishment of a finite set of predictive metrics for a given application. Predictive metrics are measurable parameters that predict a desired outcome will occur.” Col. 7 lines 63-67 state, “The user is presented with a means by which to quantify the potential value of each alternative solution. ... Potential solutions are evaluated for their ability to satisfy 100% of the desired outcome.” Col. 8 lines 10-12 state, “The invention as described herein provides an interactive approach that presents the user with weaknesses and strengths that exist in any solution.” However, Ulwick says nothing about “a customer experience flow,” “generating a customer experience flow,” “organizing components,” or “a current customer experience,” let alone teach or suggest “d) generating a customer experience flow by organizing components of a current customer experience according to their order of occurrence, wherein said customer experience flow identifies instances in which customer requirements are unmet” (emphasis added).

The response to arguments section on the last 6 lines of page 16 cite Col. 8 lines 10-27 against “d) generating a customer experience flow by organizing components of a current customer experience according to their order of occurrence, wherein said customer experience flow identifies instances in which customer requirements are unmet.” Ulwick states at Col. 8 lines 10-27,

The invention as described herein provides an interactive approach that presents the user with weaknesses and strengths that exist in any solution. The user is guided toward solutions that overcome specific weaknesses and allows them to integrate and combine the positive elements of that solution into an optimal solution. Using this interactive approach enables the user to create value producing solutions that may not have been previously considered. This focusing technology directs the user's attention and intellect to the specific parameters that must be improved in order to enhance the solution. The time the user may have wasted on solutions less likely to deliver value to the target customers is minimized and focus is maintained on important, objective, and measured parameters. (emphasis added)

Col. 8 lines 10-27 is silent with respect to "a customer experience flow," "current customer experience," "generating a customer experience flow by organizing components of a current customer experience," "order of occurrence," and therefore cannot teach or suggest "d) generating a customer experience flow by organizing components of a current customer experience according to their order of occurrence, wherein said customer experience flow identifies instances in which customer requirements are unmet" (emphasis added).

Bruce does not remedy the deficiency in Ulwick in that Bruce does not teach, among other things, "c) identifying attributes of said target customer associated with said customer experience issue to generate a customer profile; d) generating a customer experience flow by organizing components of a current customer experience according to their order of occurrence, wherein said customer experience flow identifies instances in which customer requirements are unmet," as recited by Claim 20. In fact, the Office Action does not even assert that Bruce teaches "c) identifying attributes of said target customer associated with said customer experience issue to generate a customer profile; d) generating a customer experience flow by organizing components of a current customer experience according to their order of occurrence, wherein said customer experience flow identifies instances in which customer requirements are unmet," as recited by Claim 20.

Claims 3, 5-12 and 15-17 depend on Claim 1. Claims 21-26 depend on Claim 20. Claims 31 and 32 depend on Claim 27. These dependent claims include all of the limitations of their respective independent claims. Further, these dependent claims include additional limitations which further make them patentable. Therefore, these dependent claims should be patentable for at least the reasons that their respective independent claims should be patentable.

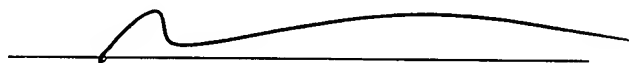
In summary, the Appellants respectfully requests that the Board reverse the Examiner's rejections of Claims 1-33.

The Appellants wishes to encourage the Examiner or a member of the Board of Patent Appeals to telephone the Appellants' undersigned representative if it is felt that a telephone conference could expedite prosecution.

Respectfully submitted,

WAGNER BLECHER LLP

Date: 6/4/02



John P. Wagner

Registration Number: 35,398

WAGNER BLECHER LLP  
Westridge Business Park  
123 Westridge Drive  
Watsonville, CA 95076  
408-377-0500

## Claims Appendix

1. (Original) A method for developing a solution to a customer experience issue, said method comprising:

- a) identifying a target customer including customer requirements and a customer profile;
- b) defining a current customer experience and comparing it with a customer experience provided by a competitor;
- c) summarizing values and benefits that should be provided to said target customer;
- d) identifying metrics for measuring success of a solution;
- e) identifying gaps between current solutions and said benefits; and
- f) generating solutions for delivering said benefits and selecting a solution path which delivers the greatest number of benefits.

2. (Original) The method as recited in Claim 1 further comprising:  
defining a future customer experience for said solution path.

3. (Original) The method as recited in Claim 2 further comprising:  
identifying milestones for delivering said values and benefits;  
identifying components of said future customer experience for each milestone;  
generating a future customer experience flow by organizing future customer experience components for each milestone according to their order of occurrence; and  
aligning said solution path with said milestones.

4. (Original) The method as recited in Claim 2 further comprising:  
developing an architecture for implementing said solution path.

5. (Original) The method as recited in Claim 4 wherein developing said architecture comprises:



- identifying milestones for delivering said values and benefits;
- identifying components of said future customer experience for each milestone;
- identifying elements of said architecture needed for each milestone; and
- assembling said elements to construct said architecture;

6. (Original) The method as recited in Claim 5 further comprising:

- identifying participants in said solution path;
- creating and prioritizing goals for said participants;
- identifying tasks for accomplishing goals selected according to their priority;
- defining use-cases describing task interactions between said participants and said solution path; and
- identifying and addressing problems with said solution path using said use-cases.

7. (Original) The method as recited in Claim 5 further comprising:

- defining a value delivery system identifying elements and participants associated with delivering said solution path to said target customer.

8. (Original) The method as recited in Claim 7 wherein defining said value delivery system comprises:

- identifying components of said future customer experience;
- identifying requirements for delivering each component of said future customer experience; and
- identifying participants who are associated with said components and delivery requirements.

9. (Original) The method as recited in Claim 8 further comprising:

- identifying gaps in said value delivery system; and
- identifying solutions addressing gaps in said value delivery system.

10. (Original) The method as recited in Claim 2 further comprising:

- defining scope, resources and schedule for implementing said solution path.

11. (Original) The method as recited in Claim 2 further comprising:  
developing a schedule for measuring performance of said solution path  
against said metrics.
12. (Original) The method as recited in Claim 11 further comprising:  
measuring performance of said solution path; and  
identifying and implementing changes to said solution path to improve  
said performance.
13. (Original) The method as recited in Claim 1 wherein said step a) comprises:  
collecting data about customers affected by said customer experience  
issue;  
segmenting customers and identifying a customer segment most affected  
by said customer experience issue, said customer segment representing said  
target customer; and  
identifying attributes of said target customer associated with said  
customer experience issue to generate said customer profile.
14. (Original) The method as recited in Claim 13 further comprising:  
generating an environmental profile of said target customer, said  
environmental profile comprising attributes of an environment associated with  
said target customer.
15. (Original) The method as recited in Claim 1 wherein said step b) comprises:  
generating a customer experience flow by organizing components of said  
current customer experience according to their order of occurrence, wherein said  
customer experience flow is referenced to said customer requirements and  
identifies instances in which said customer requirements are unmet;  
identifying gaps between attributes of said current customer experience  
and attributes of said customer experience provided by said competitor; and  
updating said customer experience flow to include said gaps between said  
attributes.
16. (Original) The method as recited in Claim 1 wherein said step c) comprises:

identifying said benefits;  
categorizing said benefits according to their value to said target customer;  
prioritizing said benefits according to their relative importance;  
selecting a subset of benefits according to their value;  
identifying milestones for delivering said values and benefits; and  
creating value propositions for each milestone, wherein a value proposition comprises a summary of value provided at each milestone.

17. (Original) The method as recited in Claim 16 further comprising:  
aligning said solution path with said milestones.

18. (Original) The method as recited in Claim 1 wherein said metrics comprise pre-release metrics and post-release metrics, wherein pre-release metrics are for measuring success during development of said solution path and wherein post-release metrics are for measuring success after implementation of said solution path.

19. (Original) The method as recited in Claim 1 wherein said step d) comprises:  
defining units of measure for said metrics;  
identifying measurement methods;  
defining criteria which indicate acceptable values for said metrics; and  
establishing baseline values for said metrics.

20. (Original) A method for developing a solution to a customer experience issue, said method comprising:

a) collecting data about customers affected by said customer experience issue;

b) segmenting customers and identifying a customer segment most affected by said customer experience issue, said customer segment representing a target customer;

c) identifying attributes of said target customer associated with said customer experience issue to generate a customer profile;

d) generating a customer experience flow by organizing components of a current customer experience according to their order of occurrence, wherein said

customer experience flow identifies instances in which customer requirements are unmet;

e) identifying gaps between attributes of said current customer experience and attributes of a customer experience provided by a competitor;

f) summarizing values and benefits that should be provided to said target customer; and

g) identifying metrics for measuring success of a solution.

21. (Original) The method as recited in Claim 20 further comprising:  
defining a future customer experience for a selected solution.

22. (Original) The method as recited in Claim 20 further comprising:  
updating said customer experience flow to include said gaps between said attributes.

23. (Original) The method as recited in Claim 20 wherein said step f) comprises:  
identifying said benefits;  
categorizing said benefits according to their value to said target customer;  
prioritizing said benefits according to their relative importance;  
selecting a subset of benefits according to their value;  
identifying milestones for delivering said values and benefits;  
creating value propositions for each milestone, wherein a value proposition comprises a summary of value provided at each milestone; and  
aligning selected solutions with said milestones.

24. (Original) The method as recited in Claim 20 further comprising:  
generating an environmental profile of said target customer, said environmental profile comprising attributes of an environment associated with said target customer.

25. (Original) The method as recited in Claim 20 wherein said metrics comprise pre-release metrics and post-release metrics, wherein pre-release metrics are for measuring success during development of said solution and wherein post-release metrics are for measuring success after implementing of said solution.

26. (Original) The method as recited in Claim 20 wherein said step g) comprises:  
defining units of measure for said metrics;  
identifying measurement methods;  
defining criteria which indicate acceptable values for said metrics; and  
establishing baseline values for said metrics.

27. (Original) A method for developing a solution to a customer experience issue, said method comprising:

- a) identifying gaps between current solutions and benefits that should be provided to a target customer;
- b) generating solutions for delivering said benefits and selecting a solution path which delivers the greatest number of benefits;
- c) defining a future customer experience for a selected solution;
- d) developing an architecture for implementing said solution path; and
- e) defining use-cases describing task interactions between participants in said solution path and said solution path.

28. (Original) The method as recited in Claim 27 further comprising:

defining a value delivery system identifying elements and participants associated with delivering said solution path to said target customer.

29. (Original) The method as recited in Claim 28 wherein defining said value delivery system comprises:

- identifying components of said future customer experience;
- identifying requirements for delivering each component of said future customer experience; and
- identifying participants who are associated with said components and delivering requirements.

30. (Original) The method as recited in Claim 29 further comprises:

- identifying gaps in said value delivery system; and
- identifying solutions addressing gaps in said value delivery system.

31. (Original) The method as recited in Claim 27 wherein said step c) further comprises:

- identifying milestones for delivering said benefits;
- identifying components of said future customer experience for each milestone;
- generating a future customer experience flow by organizing future customer experience components for each milestone according to their order of occurrence; and
- aligning said solution path with said milestones.

32. (Original) The method as recited in Claim 27 wherein said step d) comprises:

- identifying milestones for delivering said benefits;
- identifying components of said future customer experience for each milestone;
- identifying elements of said architecture needed for each milestone; and
- assembling said elements to construct said architecture.

33. (Original) The method as recited in Claim 27 wherein said step e) comprises:

- identifying said participants in said solution path;
- creating and prioritizing goals for said participants;
- identifying tasks for accomplishing goals selected according to their priority; and
- identifying and addressing problems with said solution path using said use-cases.

Evidence Appendix

None

Related Proceedings Appendix

None